






For calendar year 2020, or tax year beginning 01-01-2020, and ending 12-31-2020

Name of foundation Simon Bolivar Foundation Inc		A Employer identification number 20-5787382	
Number and street (or P.O. box number if mail is not delivered to street address) 1293 Eldridge Parkway		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code Houston, TX 77077		B Telephone number (see instructions) (832) 486-5562	
G Check all that apply: <div><input type="checkbox"/> Initial return<input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return<input type="checkbox"/> Amended return <input type="checkbox"/> Address change<input type="checkbox"/> Name change</div>		D 1. Foreign organizations, check here..... 2. Foreign organizations meeting the 85% test, check here and attach computation ...	
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶\$ 4,220,209		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here	
J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	4,500,000			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	914	914		
	4 Dividends and interest from securities				
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)				
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	 -22	-22		
	12 Total. Add lines 1 through 11	4,500,892	892		
	13 Compensation of officers, directors, trustees, etc.				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	 142,938			153,473
	b Accounting fees (attach schedule)	 31,200			31,200
	c Other professional fees (attach schedule)	 22,922			4,422
	17 Interest				
	18 Taxes (attach schedule) (see instructions)				
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	614			614
	22 Printing and publications				
	23 Other expenses (attach schedule)	 17,501	586		13,144
	24 Total operating and administrative expenses. Add lines 13 through 23	215,175	586		202,853
	25 Contributions, gifts, grants paid	3,530,736			3,359,305
	26 Total expenses and disbursements. Add lines 24 and 25	3,745,911	586		3,562,158
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	754,981			
	b Net investment income (if negative, enter -0-)		306		
c Adjusted net income (if negative, enter -0-)					

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	2,980,083	1,939,219	1,939,219
	2 Savings and temporary cash investments	276,141	277,055	277,055
	3 Accounts receivable ▶ <u>3,935</u>			
	Less: allowance for doubtful accounts ▶ _____	700	3,935	3,935
	4 Pledges receivable ▶ <u>2,000,000</u>			
	Less: allowance for doubtful accounts ▶ _____		2,000,000	2,000,000
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ _____			
	Less: allowance for doubtful accounts ▶ _____			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	29,819		
	10a Investments—U.S. and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)			
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment: basis ▶ _____			
Less: accumulated depreciation (attach schedule) ▶ _____				
12 Investments—mortgage loans				
13 Investments—other (attach schedule)				
14 Land, buildings, and equipment: basis ▶ _____				
Less: accumulated depreciation (attach schedule) ▶ _____				
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	3,286,743	4,220,209	4,220,209	
Liabilities	17 Accounts payable and accrued expenses	7,497	25,888	
	18 Grants payable	1,196,373	1,356,467	
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ _____)			
	23 Total liabilities (add lines 17 through 22)	1,203,870	1,382,355	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ <input checked="" type="checkbox"/> and complete lines 24, 25, 29 and 30.			
	24 Net assets without donor restrictions	2,080,023	2,850	
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ <input type="checkbox"/> and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds			
	27 Paid-in or capital surplus, or land, bldg., and equipment fund			
	28 Retained earnings, accumulated income, endowment, or other funds			
	29 Total net assets or fund balances (see instructions)	2,082,873	2,837,854	
	30 Total liabilities and net assets/fund balances (see instructions) .	3,286,743	4,220,209	

Part III Analysis of Changes in Net Assets or Fund Balances		
1 Total net assets or fund balances at beginning of year—Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return)	1	2,082,873
2 Enter amount from Part I, line 27a	2	754,981
3 Other increases not included in line 2 (itemize) ▶ _____	3	
4 Add lines 1, 2, and 3	4	2,837,854
5 Decreases not included in line 2 (itemize) ▶ _____	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29	6	2,837,854

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss) $\left\{ \begin{array}{l} \text{If gain, also enter in Part I, line 7} \\ \text{If (loss), enter -0- in Part I, line 7} \end{array} \right\}$	2	
	3	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8		

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income**SECTION 4940(e) REPEALED ON DECEMBER 20, 2019 - DO NOT COMPLETE**

1 Reserved			
(a) Reserved	(b) Reserved	(c) Reserved	(d) Reserved
2 Reserved			2
3 Reserved.			3
4 Reserved			4
5 Reserved			5
6 Reserved			6
7 Reserved			7
8 Reserved ,			8

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)		
b	Reserved.	1	4
c	All other domestic foundations enter 1.39% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	
3	Add lines 1 and 2.	3	4
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-.	5	4
6	Credits/Payments:		
a	2020 estimated tax payments and 2019 overpayment credited to 2020	6a	91
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	91
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached.	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed .	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid .	10	87
11	Enter the amount of line 10 to be: Credited to 2021 estimated tax 87 Refunded	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>	1b	No
c Did the foundation file Form 1120-POL for this year?	1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ► \$ _____ (2) On foundation managers. ► \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	2	No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5	No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ► DE, IL, LA, TX		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation.</i>	8b	Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2020 or the taxable year beginning in 2020? See the instructions for Part XIV. <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10	No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► http://simonbolivarfoundation.org	13	Yes	
14	The books are in care of ► <u>Ms Grisell Nouis</u> Telephone no. ► <u>(832) 486-4007</u>			

Located at ► 1293 Eldridge Parkway Houston TXZIP+4 ► 77077

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here	<input type="checkbox"/>		
	and enter the amount of tax-exempt interest received or accrued during the year	► 15		
16	At any time during calendar year 2020, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ► <u>VE</u>			

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.**

1a	During the year did the foundation (either directly or indirectly):		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b		No
	Organizations relying on a current notice regarding disaster assistance check here. ► <input type="checkbox"/>			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2020?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a	At the end of tax year 2020, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2020? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	If "Yes," list the years ► 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 2020 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2020.)	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2020?	4b		No

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a	During the year did the foundation pay or incur any amount to:		Yes	No
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
(5)	Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions.		5b	No
	Organizations relying on a current notice regarding disaster assistance check here.	<input type="checkbox"/>		
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? If "Yes," attach the statement required by Regulations section 53.4945–5(d).	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	6b	No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	7b	
b	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?			
8	Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation. See instructions				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)
3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
Weycer Kaplan Pulaski and Zuber P C 2608 Hibernia St Dallas, TX 75204	Legal services	67,480
Jones Day 901 Lakeside Ave Cleveland, OH 44114	Legal services	53,875
Total number of others receiving over \$50,000 for professional services. ▶		

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3 ▶	

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities.	1a	0
b	Average of monthly cash balances.	1b	2,733,310
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	2,733,310
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	2,733,310
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	41,000
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,692,310
6	Minimum investment return. Enter 5% of line 5.	6	134,616

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	134,616
2a	Tax on investment income for 2020 from Part VI, line 5.	2a	4
b	Income tax for 2020. (This does not include the tax from Part VI.).	2b	
c	Add lines 2a and 2b.	2c	4
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	134,612
4	Recoveries of amounts treated as qualifying distributions.	4	1,347
5	Add lines 3 and 4.	5	135,959
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	135,959

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	1a	3,562,158
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	3,562,158
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	3,562,158

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2019	(c) 2019	(d) 2020
1 Distributable amount for 2020 from Part XI, line 7				135,959
2 Undistributed income, if any, as of the end of the 2020:				
a Enter amount for 2019 only.				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2020:				
a From 2015.	13,163,255			
b From 2016.	14,756,862			
c From 2017.	11,158,236			
d From 2018.	12,051,363			
e From 2019.	4,002,061			
f Total of lines 3a through e.	55,131,777			
4 Qualifying distributions for 2020 from Part XII, line 4: ► \$ 3,562,158				
a Applied to 2019, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2020 distributable amount.				135,959
e Remaining amount distributed out of corpus	3,426,199			
5 Excess distributions carryover applied to 2020. (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	58,557,976			
b Prior years' undistributed income. Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b. Taxable amount—see instructions.				
e Undistributed income for 2019. Subtract line 4a from line 2a. Taxable amount—see instructions.				
f Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020.				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2015 not applied on line 5 or line 7 (see instructions).	13,163,255			
9 Excess distributions carryover to 2021. Subtract lines 7 and 8 from line 6a.	45,394,721			
10 Analysis of line 9:				
a Excess from 2016.	14,756,862			
b Excess from 2017.	11,158,236			
c Excess from 2018.	12,051,363			
d Excess from 2019.	4,002,061			
e Excess from 2020.	3,426,199			

Part XIV

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2020, enter the date of the ruling.

b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
		(a) 2020	(b) 2019	(c) 2018	(d) 2017	

b 85% of line 2a					
-----------------------------------	--	--	--	--	--

c Qualifying distributions from Part XII, line 4 for each year listed					
--	--	--	--	--	--

d Amounts included in line 2c not used directly for active conduct of exempt activities					
--	--	--	--	--	--

e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
--	--	--	--	--	--

3	Complete 3a, b, or c for the alternative test relied upon:					

[illegible]

(1) Value of all assets					
-----------------------------------	--	--	--	--	--

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
---	--	--	--	--	--

b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . .					
--	--	--	--	--	--

c "Support" alternative test—enter:					
-------------------------------------	--	--	--	--	--

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)						
---	--	--	--	--	--	--

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . .					
---	--	--	--	--	--

(3) Largest amount of support from an exempt organization					
---	--	--	--	--	--

(4) Gross investment income					
-----------------------------	--	--	--	--	--

Part XV **Supplementary Information** (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions

a The name, address, and telephone number or email address of the person to whom applications should be addressed:

b The form in which applications should be submitted and information and materials they should include:

c Any submission deadlines:

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

Part XV **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total ▶ 3a				3,359,305
b <i>Approved for future payment</i> See Additional Data Table				
Total ▶ 3b				1,346,447

Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
Enter gross amounts unless otherwise indicated.				
1 Program service revenue:				
a _____				
b _____				
c _____				
d _____				
e _____				
f _____				
g Fees and contracts from government agencies				
2 Membership dues and assessments. . . .				
3 Interest on savings and temporary cash investments				
		14	914	
4 Dividends and interest from securities. . . .				
5 Net rental income or (loss) from real estate:				
a Debt-financed property.				
b Not debt-financed property.				
6 Net rental income or (loss) from personal property				
7 Other investment income.				
8 Gain or (loss) from sales of assets other than inventory				
9 Net income or (loss) from special events:				
10 Gross profit or (loss) from sales of inventory				
11 Other revenue:				
a Foreign exchange loss _____		1	-22	
b _____				
c _____				
d _____				
e _____				
12 Subtotal. Add columns (b), (d), and (e). . .				
13 Total. Add line 12, columns (b), (d), and (e). 13 892				

[illegible]

Part XVII

- | | | | |
|--|--|-----|----|
| | | Yes | No |
|--|--|-----|----|

--	--	--

- | | | |
|-------|--|----|
| 1a(1) | | No |
| 1a(2) | | No |

--	--	--

- | | | |
|--------------|--|-----------|
| 1b(1) | | No |
| 1b(2) | | No |
| 1b(3) | | No |
| 1b(4) | | No |
| 1b(5) | | No |
| 1b(6) | | No |

1c		No
----	--	----

value
ue

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Sign Here <div style="border-bottom: 1px solid black; height: 30px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 30px;"></div>	<div style="border-bottom: 1px solid black; height: 30px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 30px;"></div>	<div style="border-bottom: 1px solid black; height: 30px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 30px;"></div>
Signature of officer or trustee	Date	Title

May the IRS discuss this return with the preparer shown below
 (see instr.) ☒ **Yes** ☐ **No**

Paid Preparer Use Only	Kurt Coburn				
	Firm's name ► Blazek & Vetterling				Firm's EIN ► 76-0269860
	Firm's address ► 2900 Wesleyan Suite 200 Houston, TX 77027				Phone no. (713) 439-5739

May the IRS discuss this return with the preparer shown below

(see instr.) ☒ **Yes** ☐ **No**

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
Mariela Poleo	Pres fr 2/24/20 28.50	0		
PO Box 4689 Houston, TX 77210				
Larry Elizondo	Pres to 1/24/20 0.00	0		
PO Box 4689 Houston, TX 77210				
Kate Robbins	VP to 1/24/20 0.00	0		
PO Box 4689 Houston, TX 77210				
Oscar Montenegro	Treasurer 0.75	0		
PO Box 4689 Houston, TX 77210				
Holly Chastain Nini	Secretary 16.25	0		
PO Box 4689 Houston, TX 77210				
David Weaver	Cntrl/Ast. Trea 0.10	0		
PO Box 4689 Houston, TX 77210				
Danny Rodriguez	Ast. Treasurer 1.25	0		
PO Box 4689 Houston, TX 77210				
Julie Okwara	Ast. Secretary 0.10	0		
PO Box 4689 Houston, TX 77210				
Gina Renee Coon	Director 1.75	0		
PO Box 4689 Houston, TX 77210				
Imgard Carolina Molleda	Director 1.10	0		
PO Box 4689 Houston, TX 77210				
Jennifer Moos	Dir to 4/30/20 0.10	0		
PO Box 4689 Houston, TX 77210				
Andrs Padilla	Dir fr 9/24/20 0.40	0		
PO Box 4689 Houston, TX 77210				
Luisa Palacios	Director 3.10	0		
PO Box 4689 Houston, TX 77210				
Pablo Perez	Dir fr 9/24/20 0.40	0		
PO Box 4689 Houston, TX 77210				
Alejandra Viloria Rincon	Dir to 8/27/20 0.75	0		
PO Box 4689 Houston, TX 77210				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
American Initiatives for Social Dev 117 E 70th Street New York, NY 10021	N/A	PC	COVID 19 mitigation activities in Venezuela	50,000
A Better America Foundation 2138 N State Hwy 19 Emory, TX 75440	N/A	PC	COVID 19 mitigation activities in Venezuela	18,300
Action of Solidarity Inc 7455 Collins Avenue Suite 209 Miami Beach, FL 33141	N/A	PC	COVID 19 mitigation activities in Venezuela	100,000
Total ▶ 3a				3,359,305

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Aid for Aids International 131 Varick Street Suite 1006 New York, NY 10013	N/A	PC	Humanitarian Health Programs in Venezuela and the region, and food assistance in USA	550,000
American Venezuelan Engagmnt Fdn 5223 NW 94th Doral PL Doral, FL 331782018	N/A	PC	COVID 19 mitigation activities in Venezuela	22,288
Big Little JC Association 18235 Westridge Bend Lane Cypress, TX 77433	N/A	PC	COVID 19 mitigation activities in Venezuela / Donation for food assistance in USA / event sponsorship	57,500
Total ► 3a				3,359,305

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Cuatro por Venezuela 2919 Quenby Avenue Houston, TX 77005	N/A	PC	Emergency Relief Funds for COVID-19 / Donation to local NGOs to mitigate effects of humanitarian crisis in Venezuela and the region	120,451
Driscoll Children's Hospital 3533 S Alameda Corpus Christi, TX 78411	N/A	PC	Donation to local NGOs to mitigate effects of humanitarian crisis in Venezuela and the region	20,000
Entre Todos10704 Craven St McKinney, TX 750700239	N/A	PC	PPE for health care professionals in Venezuela to prevent COVID-19 / COVID 19 mitigation activities in Venezuela	75,930
Total ► 3a				3,359,305

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Food for the Poor6401 Lyons Road Coconut Creek, FL 33073	N/A	PC	Humanitarian Health Programs in Venezuela and the region	250,000
Food Rescue US27 Ann Street Norwalk, CT 06854	N/A	PC	Food assistance in USA	50,000
Friends of the Children of Venezuel 1333 S Miami Avenue Suite 100 Miami, FL 331304325	N/A	PC	COVID 19 mitigation activities in Venezuela	75,113
Total ▶ 3a				3,359,305

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Fulshear Outreach Dev Corp 5757 Flewellen Oaks Lane 303 Fulshear, TX 77441	N/A	PC	Food assistance in USA	25,000
Hospital Materno Infantil La Playa Calle San Bartolome Sector Macuto, Estado Vargas VE	N/A	PC	Med. Equip., Supplies and Services to Hospitals for Provision of Healthcare	1,110
I love Venezuela Foundation 2825 South Miami Avenue Miami, FL 33129	N/A	PF	PPE for health care professionals in Venezuela to prevent COVID-19 / COVID 19 mitigation activities in Venezuela / Donation for food assistance in USA	200,000
Total ▶ 3a				3,359,305


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Inst Anzoatiguense Salud - SALUDANZ Avenida Arginio Gabaldon Sector Las Colinas, Barcelona Estado VE	N/A	PC	Med. Equip., Supplies and Services to Hospitals for Provision of Healthcare	83,450
International Federation of Red Cro Chemin des Crets 17 Petit Saconnex, 1209 Geneva SZ	N/A	PC	Humanitarian Health Programs in Venezuela and the region	250,000
Latin Ladies Foundation of Houston 4722 Natural Bridge Dr Kingwood, TX 77345	N/A	PC	Emergency Relief Funds for COVID-19 / Donation to local NGOs to mitigate effects of humanitarian crisis in Venezuela and the region	45,000
Total ▶ 3a				3,359,305

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Magis America1016 16th NW Washington, DC 20036	N/A	PC	Sponsorship for an event	30,000
Partners For Andean Community Healt 8 Caryn Lane Weatogue, CT 06089	N/A	PC	Donation to local NGOs to mitigate effects of humanitarian crisis in Venezuela and the region	6,000
Plan Pais Inc1622 Main St East Hartford, CT 06108	N/A	PC	Sponsorship for an event	7,500
Total ▶ 3a				3,359,305

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Saludos Connection3770 Farber St Houston, TX 77005	N/A	PC	Donation to local NGOs to mitigate effects of humanitarian crisis in Venezuela and the region / Donation for food assistance in USA	29,395
Saludos Connection3770 Farber St Houston, TX 77005	N/A	PC	Emergency Relief Funds for COVID-19 / Event Sponsorship	25,300
Sociedad Amigos del HEP 9600 NW 25 St Suite 6D Doral, FL 33172	N/A	PC	COVID 19 mitigation activities in Venezuela	20,000
Total ► 3a				3,359,305

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SVC Foundation Corp 2930 NW 108 Avenue Doral, FL 33172	N/A	PC	Food assistance in USA	40,000
Texas Children's Hospital 1919 S Braeswood Blvd Ste 5214 Houston, TX 77030	N/A	PC	Donation to local NGOs to mitigate effects of humanitarian crisis in Venezuela and the region	16,000
Universidad Central De Venezuela Urbanizacion Los Chaguaramos Cuidad Universitaria, Caracas VE	N/A	GOV	COVID 19 mitigation activities in Venezuela	35,000
Total ▶ 3a				3,359,305

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Medical grants - see attachment State and zip code for e-filing purposes, TX 77077	None	I	Support medical treatment of critically ill persons unable to afford necessary specialized care	1,155,968
Total  3a				3,359,305

TY 2020 Accounting Fees Schedule**Name:** Simon Bolivar Foundation Inc**EIN:** 20-5787382**Software ID:** 20011551**Software Version:** 2020v4.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Audit, tax planning & compliance	31,200	0	0	31,200

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2020 Expenditure Responsibility Statement

Name: Simon Bolivar Foundation Inc

EIN: 20-5787382

Software ID: 20011551

Software Version: 2020v4.0

Grantee's Name	Grantee's Address	Grant Date	Grant Amount	Grant Purpose	Amount Expended By Grantee	Any Diversion By Grantee?	Dates of Reports By Grantee	Date of Verification	Results of Verification
I love Venezuela Foundation	2825 South Miami Avenue Miami, FL 33129	2020-05-27	50,000	Food program for Venezuelan Diaspora	50,000	No	10/21/2020		The grantor has no reason to doubt the accuracy or reliability of the report from the grantee; therefore, no independent verification of the report was made.
I love Venezuela Foundation	2825 South Miami Avenue Miami, FL 33129	2020-05-26	39,850	Donation to PPE for health care professionals in Venezuela	39,850	No	7/14/2020, 8/20/2020, 4/20/2021		The grantor has no reason to doubt the accuracy or reliability of the report from the grantee; therefore, no independent verification of the report was made.
I love Venezuela Foundation	2825 South Miami Avenue Miami, FL 33129	2020-07-27	10,150	Donation to PPE for health care professionals in Venezuela	10,150	No	6/16/2021		The grantor has no reason to doubt the accuracy or reliability of the report from the grantee; therefore, no independent verification of the report was made.
I love Venezuela Foundation	2825 South Miami Avenue Miami, FL 33129	2020-10-15	100,000	Donation of PPE for health care professionals in Venezuela		No	report not yet received		N/A

TY 2020 Legal Fees Schedule**Name:** Simon Bolivar Foundation Inc**EIN:** 20-5787382**Software ID:** 20011551**Software Version:** 2020v4.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
General governance & counsel	142,938	0	0	153,473

TY 2020 Other Expenses Schedule**Name:** Simon Bolivar Foundation Inc**EIN:** 20-5787382**Software ID:** 20011551**Software Version:** 2020v4.0**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Bank charges	586	586		
Insurance	11,506			8,161
Other patient expenses	5,409			4,983

TY 2020 Other Income Schedule**Name:** Simon Bolivar Foundation Inc**EIN:** 20-5787382**Software ID:** 20011551**Software Version:** 2020v4.0**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Foreign exchange loss	-22	-22	

TY 2020 Other Professional Fees Schedule**Name:** Simon Bolivar Foundation Inc**EIN:** 20-5787382**Software ID:** 20011551**Software Version:** 2020v4.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Administrative services	16,071	0	0	0
Translation services	6,851	0	0	4,422

Schedule B (Form 990, 990-EZ, or 990-PF) <small>Department of the Treasury Internal Revenue Service</small>	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF. ▶ Go to <u>www.irs.gov/Form990</u> for the latest information.	OMB No. 1545-0047
		2020
Name of the organization Simon Bolivar Foundation Inc		Employer identification number 20-5787382

Organization type (check one):

Filers of:	Section:
Form 990 or 990-EZ	<input type="checkbox"/> 501(c)() (enter number) organization
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	<input type="checkbox"/> 527 political organization
Form 990-PF	<input checked="" type="checkbox"/> 501(c)(3) exempt private foundation
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation
	<input type="checkbox"/> 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization
Simon Bolivar Foundation IncEmployer identification number
20-5787382**Part I****Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	CITGO Petroleum Corporation PO Box 4689 Houston, TX 77210	\$ 4,500,000	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <small>(Complete Part II for noncash contributions.)</small>
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <small>(Complete Part II for noncash contributions.)</small>
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <small>(Complete Part II for noncash contributions.)</small>
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <small>(Complete Part II for noncash contributions.)</small>
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <small>(Complete Part II for noncash contributions.)</small>
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <small>(Complete Part II for noncash contributions.)</small>
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <small>(Complete Part II for noncash contributions.)</small>
		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <small>(Complete Part II for noncash contributions.)</small>

Name of organization Simon Bolivar Foundation Inc	Employer identification number 20-5787382
--	--

Part II Noncash Property			
(a) No. from Part I	(b) Description of noncash property given <small>(see instructions). Use duplicate copies of Part II if additional space is needed.</small>	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	

Employer identification number

20-5787382

Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.) ▶ \$ _____
Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	
	_____	_____	
	_____	_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	
	_____	_____	
	_____	_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	
	_____	_____	
	_____	_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	
	_____	_____	
	_____	_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	
	_____	_____	
	_____	_____	

Part XV, Line 3a - Grants and Contributions Paid During the Year

Grantee Name	Address	Amount
Adelianny Rodriguez Guillen	1293 Eldridge Parkway Houston, TX 77077	\$ 84,054
Alberto Jose Arteaga Gonzalez	1293 Eldridge Parkway Houston, TX 77077	\$ 5,846
Cesar Augusto Roo Torres	1293 Eldridge Parkway Houston, TX 77077	\$ 144
Cristina D'Agostino	1293 Eldridge Parkway Houston, TX 77077	\$ 13,800
Edgardo Jose Armas Gallardo	1293 Eldridge Parkway Houston, TX 77077	\$ 22,817
Felix Manuel Marin Borthomierth	1293 Eldridge Parkway Houston, TX 77077	\$ 109,932
Isabella Lisandri Guevara Albornoz	1293 Eldridge Parkway Houston, TX 77077	\$ 87,433
Jorge Yannel Parra Garcia	1293 Eldridge Parkway Houston, TX 77077	\$ 1,584
Jose Gregorio Rangel Suarez	1293 Eldridge Parkway Houston, TX 77077	\$ 12,447
Kelvin Alexander Lopez Teran	1293 Eldridge Parkway Houston, TX 77077	\$ 8,573
Luis Fernando Beltran Beltran	1293 Eldridge Parkway Houston, TX 77077	\$ 249,720
Marco Bello	1293 Eldridge Parkway Houston, TX 77077	\$ 45,465
Maria De Los Angeles Amaya	1293 Eldridge Parkway Houston, TX 77077	\$ 108,358
Mauricio Andres Suarez Campos	1293 Eldridge Parkway Houston, TX 77077	\$ 314
Nelson José Useche Oropeza	1293 Eldridge Parkway Houston, TX 77077	\$ 323,067
Oscar Rainer Breto Vidal	1293 Eldridge Parkway Houston, TX 77077	\$ 1,639

Part XV, Line 3a - Grants and Contributions Paid During the Year

Grantee Name	Address	Amount
Sebastian Perez	1293 Eldridge Parkway Houston, TX 77077	\$ 1,592
Stephanie Milagros Rodriguez Ramos	1293 Eldridge Parkway Houston, TX 77077	\$ 700
Valeria Stefania Sanchez Perozo	1293 Eldridge Parkway Houston, TX 77077	\$ 1,586
Victoria Valentina Garcia Barrera	1293 Eldridge Parkway Houston, TX 77077	\$ 23,370
Ximena Sophia Longa Perez	1293 Eldridge Parkway Houston, TX 77077	\$ 53,527
Total Medical Grants Paid to Individuals		<u>\$ 1,155,968</u>

Part XV, Line 3a - Grants and Contributions Paid During the Year

Additional information regarding programs

The Simon Bolívar Foundation (SBF) primarily funds charitable grants to improve the health of vulnerable populations affected by disaster, conflict and poverty, with special attention to mothers and children, in and out of Venezuela, with three main objectives: i) increasing access to medicine and nutrition thereby improving the wellbeing of vulnerable populations, ii) enhancing capacity of medical professionals and caregivers to serve and treat patients in need through education and support and iii) empowerment of Non-governmental organizations (NGOs) to serve the health needs of the most vulnerable individuals in their communities. The programs approved by the Board of directors are divided into three categories:

- Humanitarian Health Small grants and capacity building: Empowers local organizations that work to lessen the suffering of individuals in need affected by the humanitarian crisis in Venezuela.
- Medium / large Humanitarian Health grants: Provides support to programs and organizations that align with the Foundation's goals of expanding access to medicine and nutrition that ultimately improves the well-being of the most vulnerable individuals in and from Venezuela. This programs includes Strategic Partnerships with renowned and long-standing not-for-profit organizations with demonstrated capacity to execute humanitarian health programs in Venezuela and the Latin American Region and Knowledge Transfer grants that aim to enhance the capacity of medical professionals and caregivers to serve and treat patients in Venezuela.
- Medical grants: support critically ill patients in need.

The Foundation is located in Houston, Texas. CITGO Petroleum Corporation is the sole member and primary contributor of the Foundation at this time. During 2020 CITGO made contributions to support the programs of the Foundation for \$4,500,000. Approximately 40 – 50 CITGO employees volunteer their time to the SBF in providing services such as operational, accounting, tax, legal, procurement, audit and other services, for a total of approximately 16,590 volunteer hours.

On January 28, 2019, the U.S. Department of Treasury's Office of Foreign Assets Control ("OFAC") added CITGO's parent company Petroleos de Venezuela, S.A. (PDVSA) to the List of Specially Designated nationals and Blocked Persons ("SDN List"), generally prohibiting U.S. persons from engaging in any transaction in which PDVSA or any entity owned 50 percent or more by PDVSA has any property interest. On February 26, 2019, OFAC issued special license No. Venezuela-EO13850-2019-359230-1 authorizing the Foundation to continue to provide assistance and financial support for ongoing medical treatment, medicines, medical devices, and related services to 59 patients referred by PDVSA, as well as to cover any remaining expenses in connection with such treatment pursuant to existing grant agreements with the patients and service agreements with the patients' healthcare providers and other service providers entered prior to January 28, 2019. This special license was set to expire on July 27, 2019. The Foundation has since filed several extension requests with OFAC, and OFAC has granted extensions to the license with the most recent extension granted by OFAC on July 15, 2021 to continue to provide medical assistance and financial support to the remaining patients. The Foundation has encountered significant obstacles primarily due to delays and other complications in providing medical services relating to the COVID-19 pandemic and in transitioning them to other charitable organizations and medical institutions that can continue to assist with their long-term medical needs. It is unclear at this time whether or when the sanctions may be lifted or if additional sanctions may be put in place. Other charitable programs executed by the Foundation are not impacted by the sanctions explained above.

Part XV, Line 3b - Grants and Contributions Approved for Future Payment

Grantee Name	Address	Amount
Adelianny Rodriguez Guillen	1293 Eldridge Parkway Houston, TX 77077	\$ 31,763
Alberto Jose Arteaga Gonzalez	1293 Eldridge Parkway Houston, TX 77077	7,791
Amanda Linda Merhi Borhot	1293 Eldridge Parkway Houston, TX 77077	20,017
Antonio Gómez Arévalo	1293 Eldridge Parkway Houston, TX 77077	6,343
Cesar Gutierrez	1293 Eldridge Parkway Houston, TX 77077	16,654
Edgardo Jose Armas Gallardo	1293 Eldridge Parkway Houston, TX 77077	38,238
Felix Manuel Marin Borthomierth	1293 Eldridge Parkway Houston, TX 77077	31,747
Isabella Lisandri Guevara Albornoz	1293 Eldridge Parkway Houston, TX 77077	56,035
Jeanette Michele Packard-Milam	1293 Eldridge Parkway Houston, TX 77077	10,000
Jorge Yanniell Parra Garcia	1293 Eldridge Parkway Houston, TX 77077	7,965
Jose Gregorio Rangel Suarez	1293 Eldridge Parkway Houston, TX 77077	56,403
Kelvin Alexander Lopez Teran	1293 Eldridge Parkway Houston, TX 77077	25,377
Leymar Paola Guerrero Baez	1293 Eldridge Parkway Houston, TX 77077	7,305
Luis Fernando Beltran Beltran	1293 Eldridge Parkway Houston, TX 77077	40,261
Marco Bello	1293 Eldridge Parkway Houston, TX 77077	43,012
Maria De Los Angeles Amaya - Patient	1293 Eldridge Parkway Houston, TX 77077	36,588

Part XV, Line 3b - Grants and Contributions Approved for Future Payment

Grantee Name	Address	Amount
Mauricio Andres Suarez Campos	1293 Eldridge Parkway Houston, TX 77077	24,988
Maximo Fabrizzio Guevara Hidalgo	1293 Eldridge Parkway Houston, TX 77077	4,988
Nelson José Useche Oropeza	1293 Eldridge Parkway Houston, TX 77077	95,773
Oscar Rainer Breto Vidal	1293 Eldridge Parkway Houston, TX 77077	4,922
Sebasthian Perez	1293 Eldridge Parkway Houston, TX 77077	8,178
Stephanie Milagros Rodriguez Ramos	1293 Eldridge Parkway Houston, TX 77077	87,141
Valeria Stefania Sanchez Perozo	1293 Eldridge Parkway Houston, TX 77077	4,974
Victoria Valentina Garcia Barrera	1293 Eldridge Parkway Houston, TX 77077	128,046
Ximena Sophia Longa Perez	1293 Eldridge Parkway Houston, TX 77077	16,728
Zulay Josefina Martinez de Esteves	1293 Eldridge Parkway Houston, TX 77077	6,710
Total Medical Grants to Individuals Approved for Future Payment		<u><u>\$ 817,947</u></u>